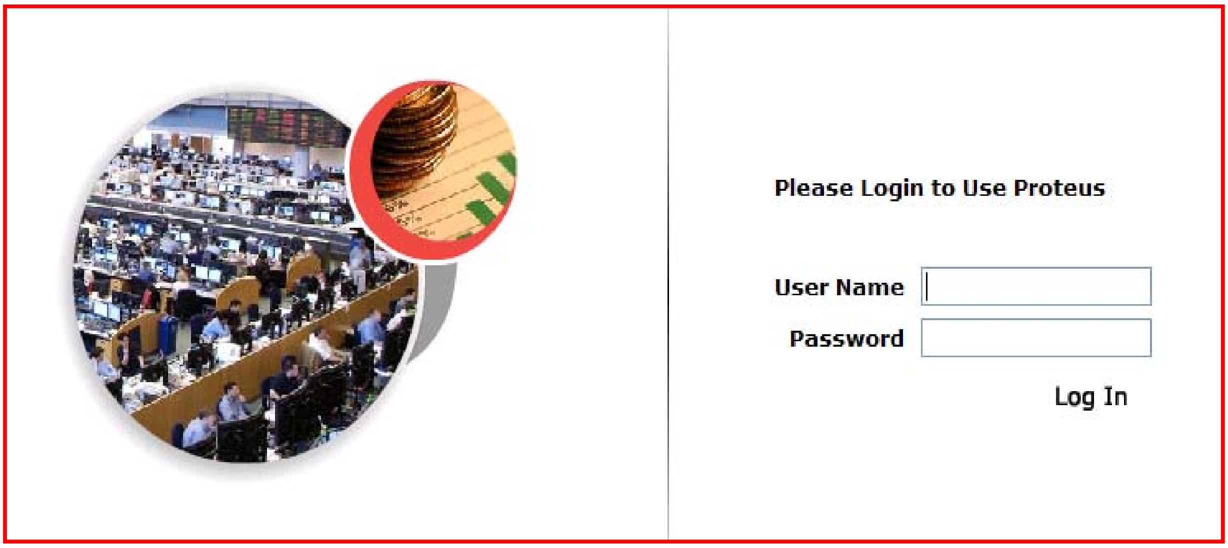
Proteus Telephone Management System

User Manual

Software Version 6
Manual Version 1.1



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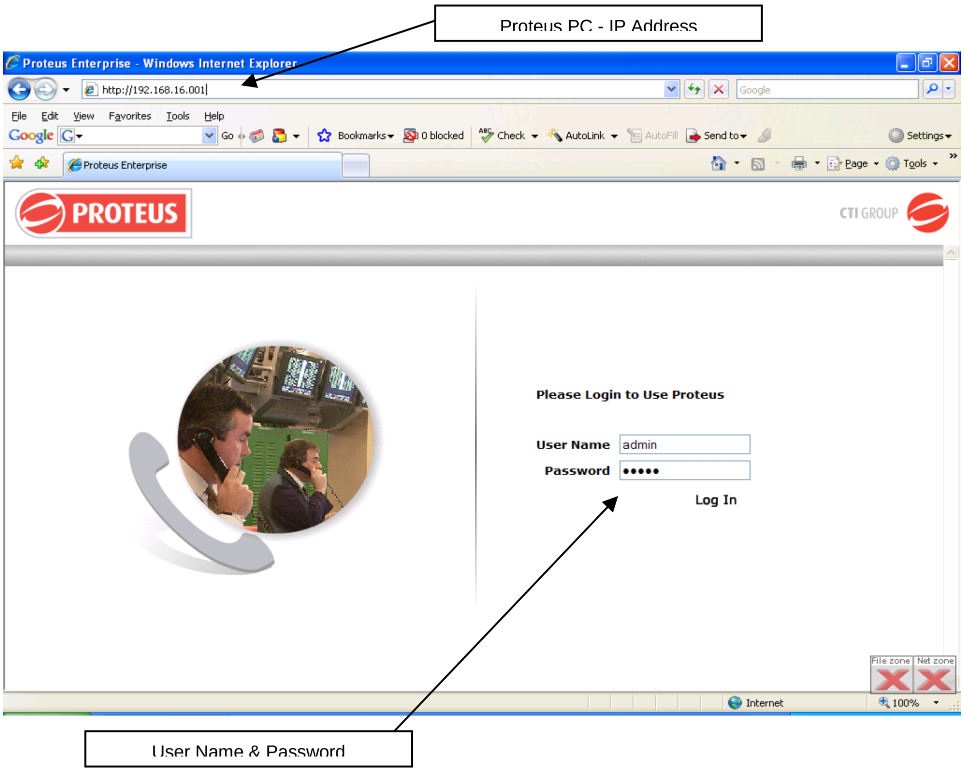
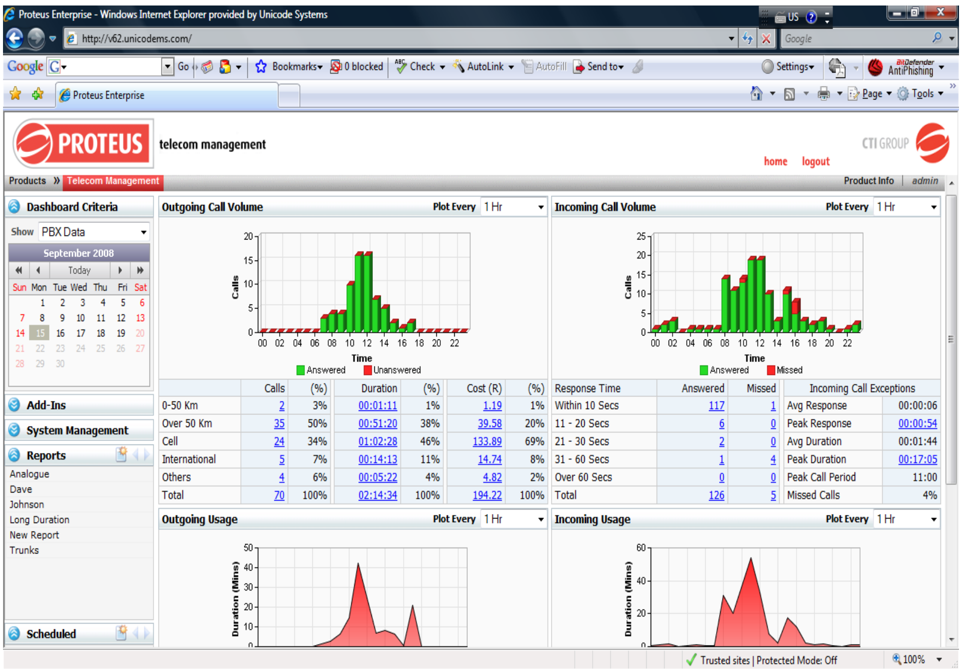
1. <u>Logging onto the Proteus Telephone Management System</u>

Proteus Enterprise allows anyone to access the TMS report facility simply by typing in the address on the Internet Explorer. The Proteus server PC IP address must be typed into the Internet Explorer address bar.

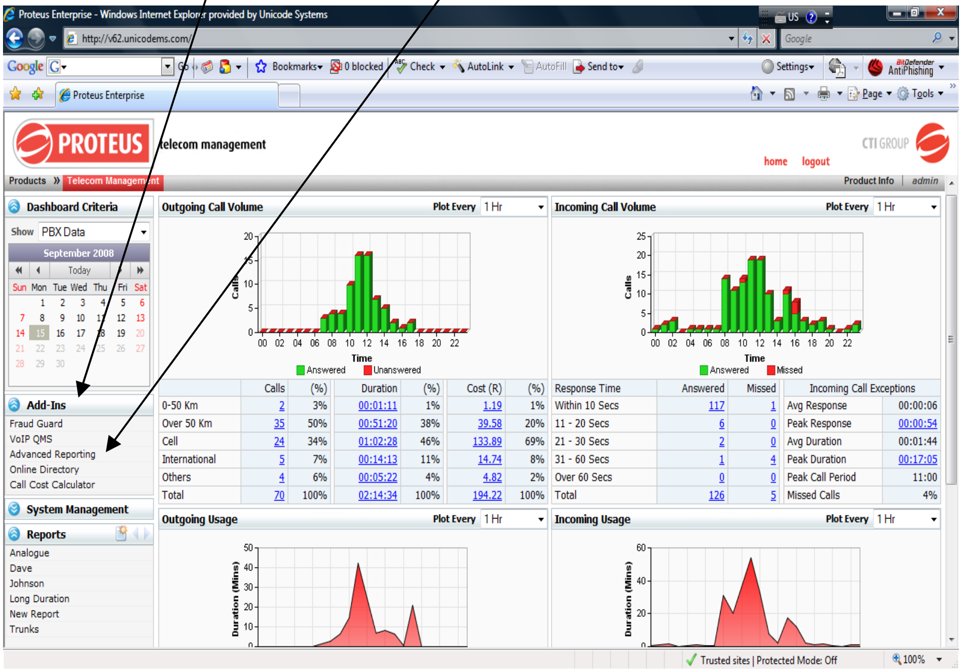


Once you've typed your User Name and Password, the Proteus Server will authenticate your logon name and password against its internal list. The following Main Menu will appear.

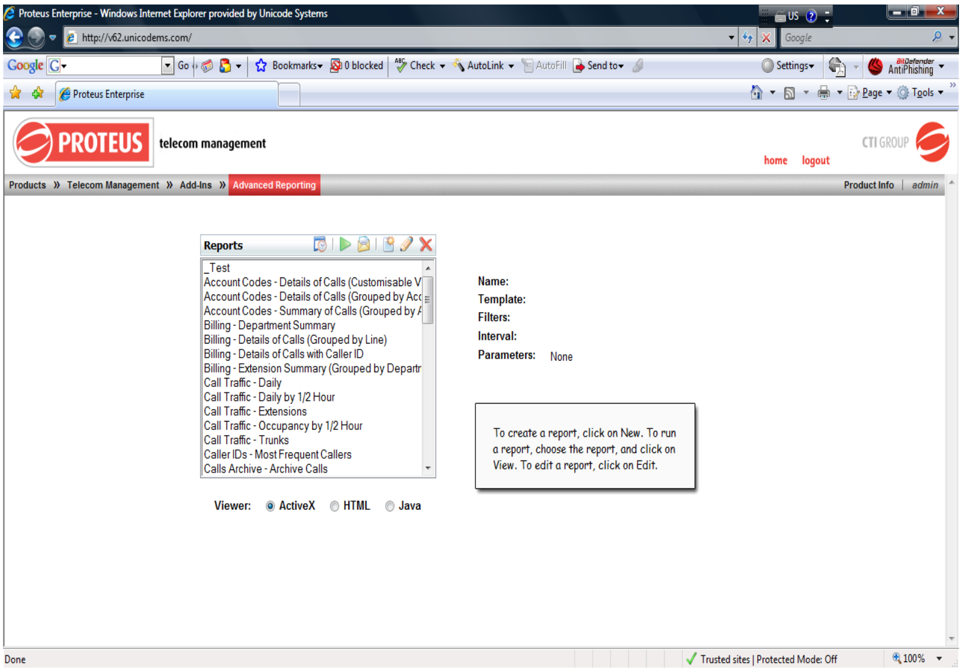


2. Reports Screen

2.1 From the Main screen CLICK on **Add-Ins** and the CLICK on **Advanced Reporting** (middle left of the screen).

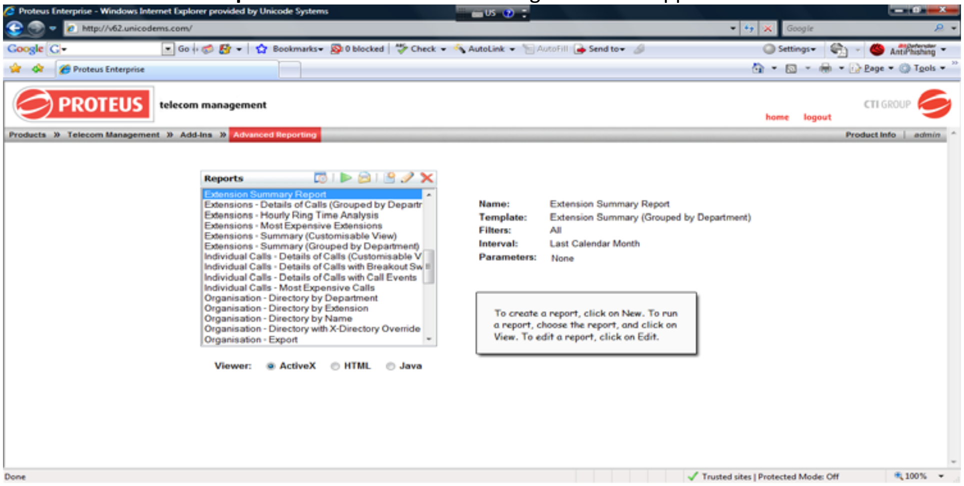


- The following Reports screen will appear. This is where your reports are configured. Any report you may create is unique to your logon and nobody else can access this report.

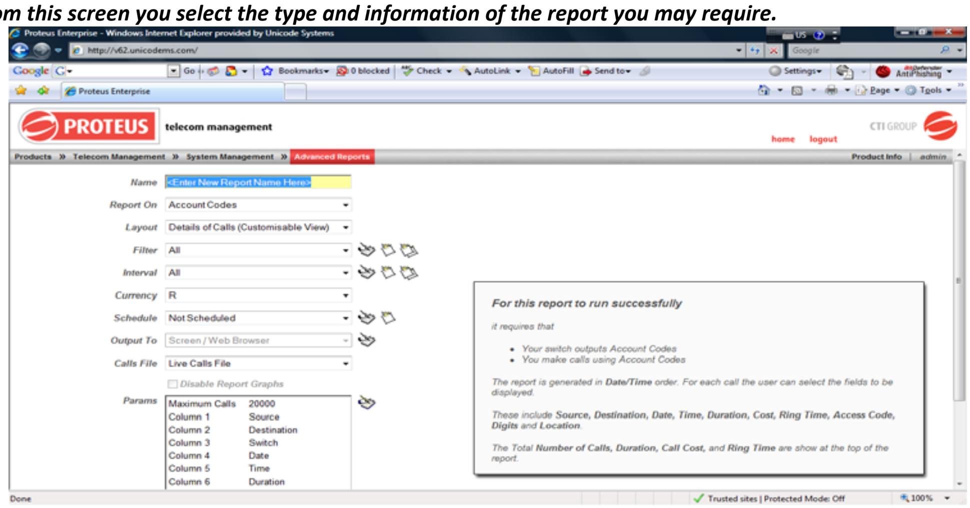


3. Setting Up a Report

3.1 **CLICK** on the **Create New Report** button. The following screen will appear.



3.2 ***From this screen you select the type and information of the report you may require.***



- By **Name**, type a name for your report. E.g. Extension Summary Report.
- By **Report On**, CLICK on the dropdown arrow and select a report Type. E.g. Billing.
- By **Layout**, CLICK on the dropdown arrow and select the report you need. E.g. Extension Summary.
- By **Filter**, CLICK on the dropdown arrow and select the Filter you need E.g. All.
  - o (See points 4.1 to 4.3 to select specific Exts, Depts, and Switches).
- By **Interval**, CLICK on the dropdown arrow and select the dates you need for the report. E.g. Last Calendar Month.
  - o (See point 5.1 to select your own dates).
- By **Currency**, CLICK on the dropdown arrow and always keep the selection to **R**.
- By **Schedule**, you can choose to **Not Scheduled** or **Batch, Daily, Weekly, Monthly** etc.
  - o (See point 6.1 to schedule the report).
- By **Output To**, will be greyed out if you did not select "schedule" and is used when you want to View or immediately E-mail the report.
  - o (See output options under schedules in point 6.1)
- **Note:** If you do *not* want graphs to show on the reports then "Tick" the **Disable Report Graphs** box.
- By **Params**, it is automatically set to **None**.
  - o (See point 7.1 for Parameters options)
- The report is now setup. CLICK on the **Save** button.

NOTE: Only for Companies that use pin codes

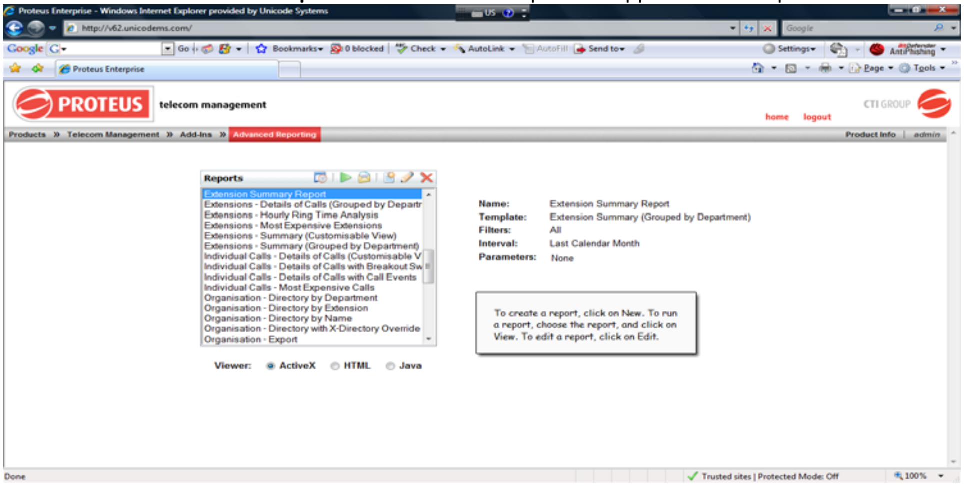
a) Use the Person Summary or Person Detail reports (you can select to only show People, under the **Parameters**.

b) This report / reporting rule only applies if you do *not* have a Hicom 300 / Hipath 4000 PABX.

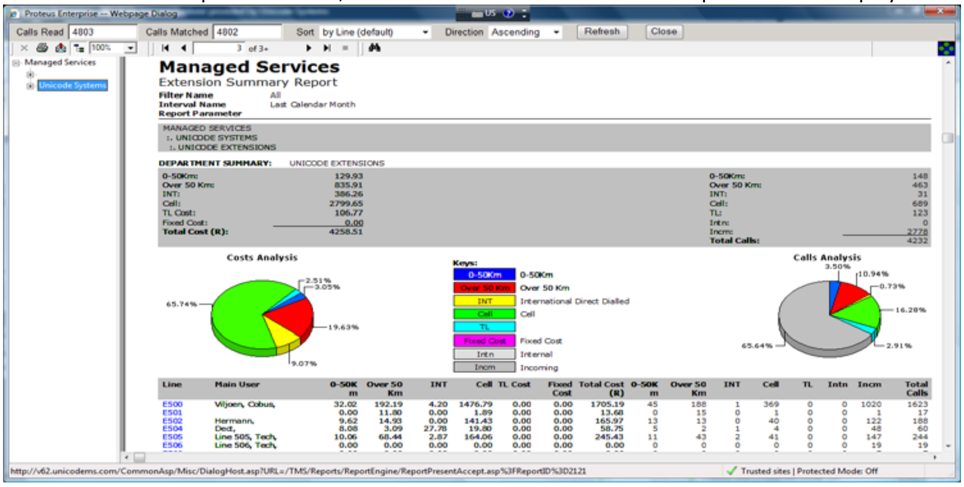
NOTE: All Reports / Reporting Users

a) On all Detail reports, you need to increase the Call Match Limit from 2000 to 50 000 under the **Parameters**.

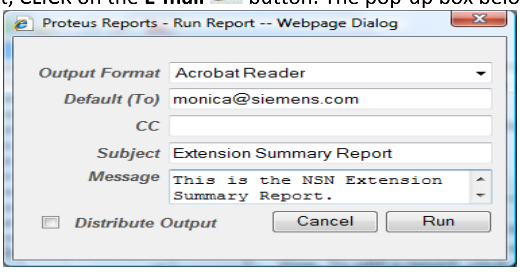
3.3 You will now be back at the first **Report List** screen & the report will appear on the Reports List.



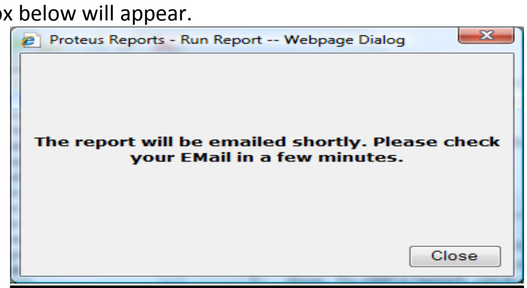
3.3.1 To **View** the report on screen, CLICK on the **View** button. The report will now display on screen.



3.3.2 To **E-mail** the report, CLICK on the **E-mail** button. The pop-up box below will appear.

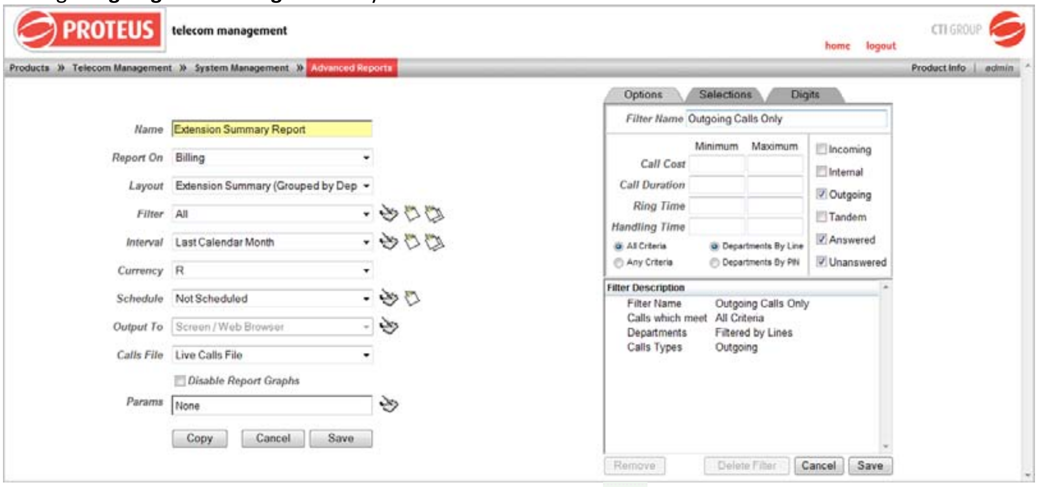


- By **Output Format,** CLICK on the dropdown arrow and select the format you prefer E.g. Adobe Reader.
- By **To,** Type the e-mail address of the report recipient.
- By **CC,** Type other report recipients you may want to “copy” on the report e-mail.
- By **Subject,** Type a short description for the Report.
- By **Message,** Type a short message to the report recipient.
- CLICK on **Run,** the pop-up box below will appear.



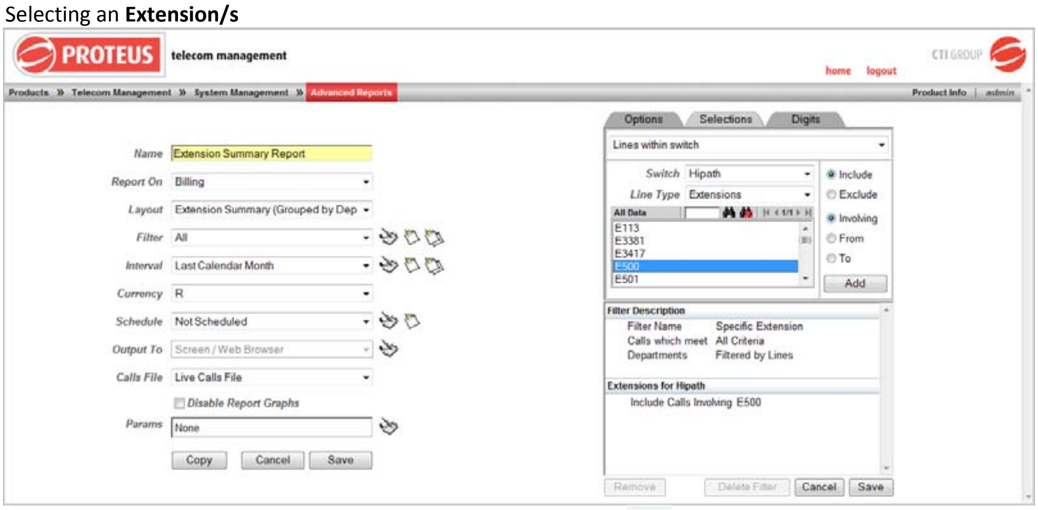
4. Setting up Report Filters

4.1 Selecting **Outgoing** or **Incoming** Calls Only



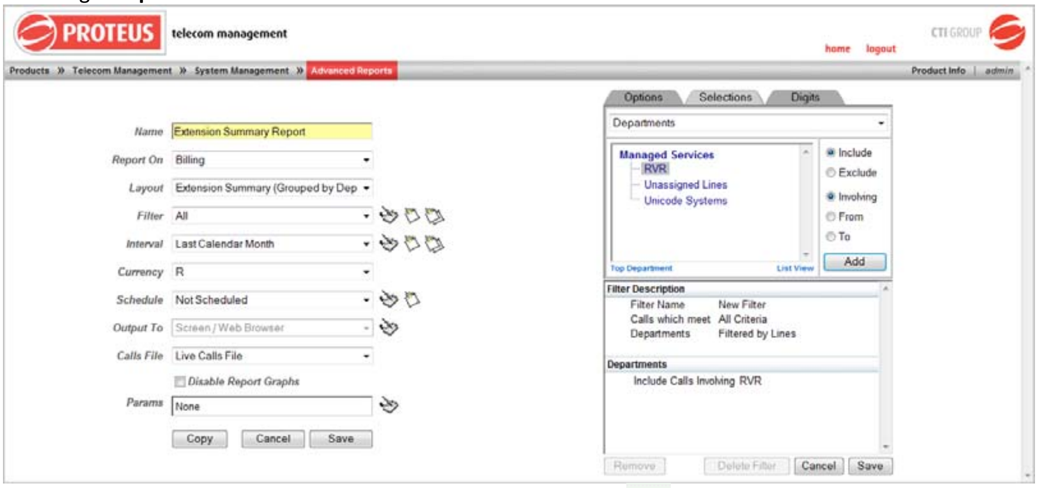
- From the Report setup screen (as in point 3.1), CLICK on the **New** the button, next to the dropdown arrow by the **Filter.**
- A screen will pop-up on the right hand side (this is the Filter Selection screen).
- By **Filter Name,** Type a unique name for the new Filter E.g. Outgoing Calls Only.
- On the right-hand side of the screen, un-check the Incoming, Internal and Tandem boxes. The **Outgoing, Answered** and **Unanswered** boxes must remain checked .
- Now CLICK on **Save** on the right-hand side of the screen and then CLICK **Save** on the left of the screen. You can now run the report as normal (as in 3.3.1 & 3.3.2).
    - o Follow the *exact* same procedure for **Incoming** calls (un-check Outgoing and leave Incoming checked).

4.2 Selecting an **Extension/s**



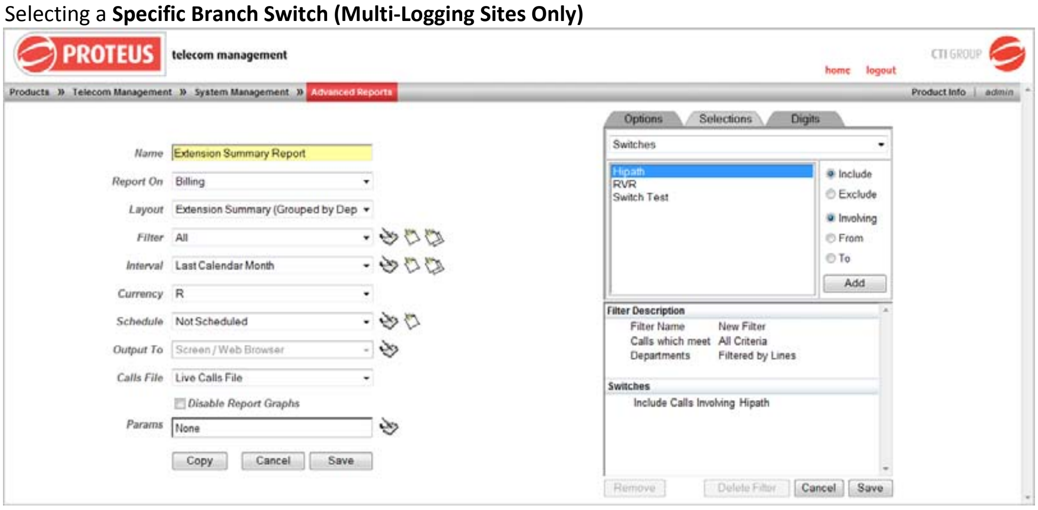
- From the Report setup screen (as in point 3.1), CLICK on the **New** the button, next to the dropdown arrow by the **Filter.**
- A screen will pop-up on the right hand side (this is the Filter Selection screen).
- By **Filter Name,** Type a unique name for the new Filter E.g. E500 Specific.
- CLICK on the **Selection** tab (at the top by Options, Selections, Digits). Where it shows **Switches,** CLICK on the dropdown arrow and CLICK on **Lines within Switch.**
- By **Switch,** CLICK on the dropdown arrow and select the Switch you require (multi-site systems only).
- By **Line Type,** leave the selection on **Extensions.** A list of the extensions will appear, CLICK on the extension you require and CLICK on **Add.** (You may **Add** as many extensions as you require). The extension will now appear in the bottom of the box.
- Now CLICK on **Save** on the right-hand side of the screen and then CLICK **Save** on the left of the screen. You can now run the report as normal (as in 3.3.1 & 3.3.2).

4.3 Selecting a **Department**



- From the Report setup screen (as in point 3.1), CLICK on the **New**  the button, next to the dropdown arrow by the **Filter.**
- A screen will pop-up on the right hand side (this is the Filter Selection screen).
- By **Filter Name,** Type a unique name for the new Filter E.g. Specific Dept RVR.
- CLICK on the **Selection** tab (at the top by Options, Selections, Digits). Where it shows **Switches,** CLICK on the dropdown arrow and CLICK on **Departments.**
- A list of the Departments will appear, CLICK on the Department you require and CLICK on **Add.** (You may **Add** as many Departments as you require). The Department will now appear in the bottom of the box.
- Now CLICK on **Save** on the right-hand side of the screen and then CLICK **Save** on the left of the screen. You can now run the report as normal (as in 3.3.1 & 3.3.2).

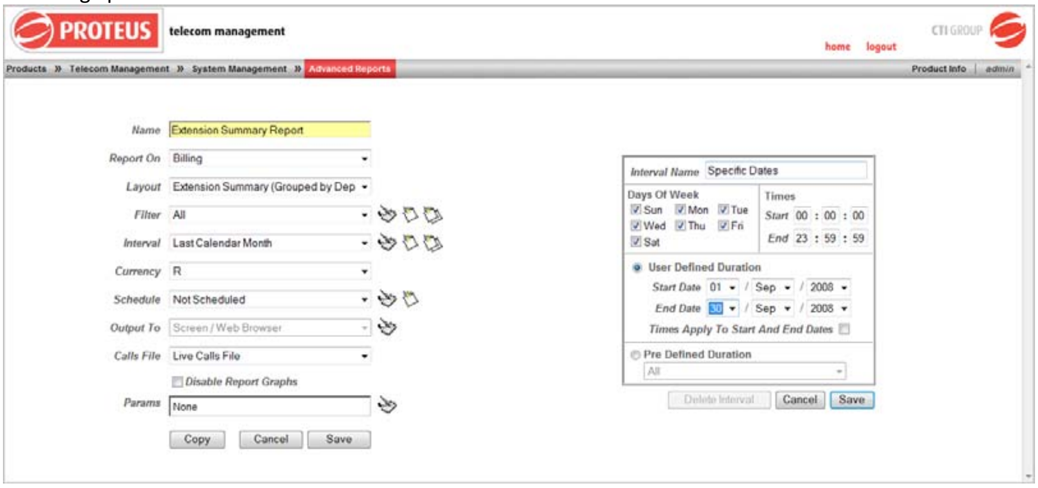
4.4 Selecting a **Specific Branch Switch (Multi-Logging Sites Only)**



- From the Report setup screen (as in point 3.1), CLICK on the **New**  the button, next to the dropdown arrow by the **Filter.**
- A screen will pop-up on the right hand side (this is the Filter Selection screen).
- By **Filter Name,** Type a unique name for the new Filter E.g. Switch Hipath.
- CLICK on the **Selection** tab (at the top by Options, Selections, Digits). Where it shows **Switches,** CLICK on the dropdown arrow and CLICK on **Switches.**
- A list of the Switches will appear, CLICK on the Switch you require and CLICK on **Add.** (You may **Add** as many Switches as you require). The Switch will now appear in the bottom of the box.
- Now CLICK on **Save** on the right-hand side of the screen and then CLICK **Save** on the left of the screen. You can now run the report as normal (as in 3.3.1 & 3.3.2).

5. Setting up Specific Interval Dates

5.1 Selecting Specific Dates on an **Interval**



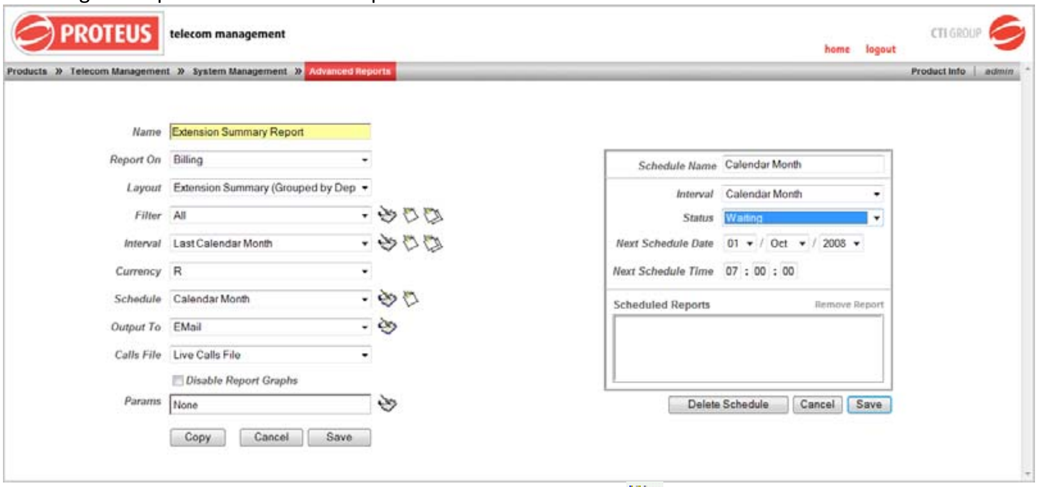
- From the Report setup screen (as in point 3.1), CLICK on the **New** the button, next to the dropdown arrow by **Interval.**
- A screen will pop-up on the right hand side (this is the Interval Selection screen).
- By **Interval Name,** Type a unique name for the new Filter E.g. Specific Dates.
- CLICK on the **User Defined Duration** button .
- By **Start Date,** CLICK on the first dropdown arrow and select the day on which the report must begin; then CLICK on the second dropdown arrow and select the month; then CLICK on the third dropdown arrow and select the year.
- By **End Date,** CLICK on the first dropdown arrow and select the day on which the report must begin; then CLICK on the second dropdown arrow and select the month; then CLICK on the third dropdown arrow and select the year.
- Now CLICK on **Save** on the right-hand side of the screen and then CLICK **Save** on the left of the screen. You can now run the report as normal (as in 3.3.1 & 3.3.2).

Recommendations:

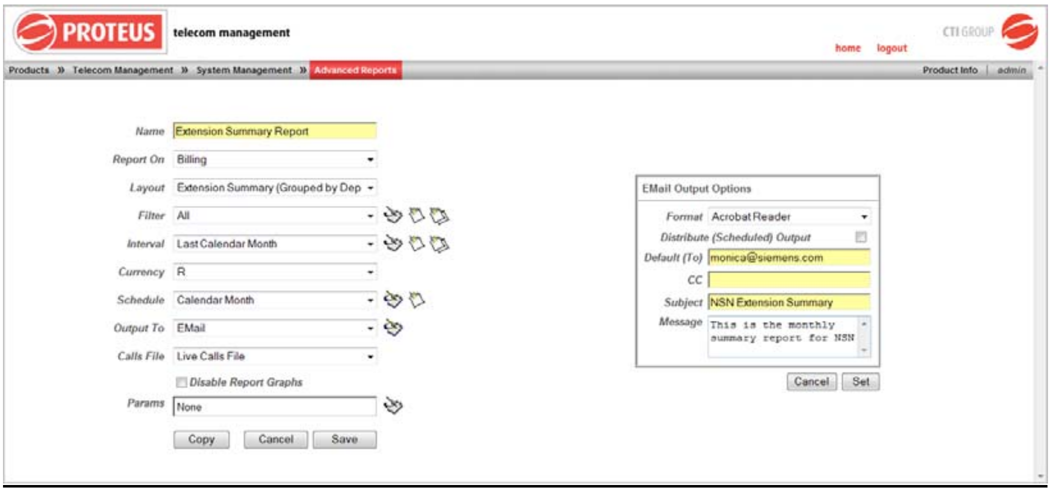
- Leave all the **Days Of Week** boxes ticked.
- Leave the **Times** - Start & End as 00:00:00 to 23:59:59 (If you *do* enter a start and end time then you *must* check the **Times Apply To Start And End Dates** box.

6. Scheduling a Report

6.1 Selecting the Report Schedule and Output



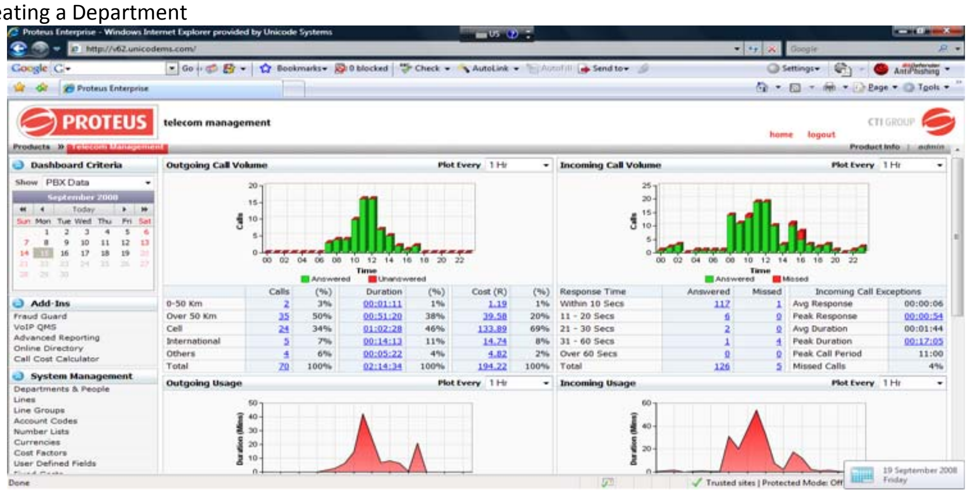
- From the Report setup screen (as in point 3.1), CLICK on the **New** the button, next to the dropdown arrow by **Schedule.**
- Select the type of schedule you require E.g. Calendar Month (Weekly or Daily).
- By **Interval,** leave the selection to Calendar Month (leave to Weekly or Daily if you selected one of these options).
- By **Status,** CLICK on the dropdown arrow and select **Waiting**.
- By **Start Date,** CLICK on the first dropdown arrow and select the day on which the report must begin; then CLICK on the second dropdown arrow and select the month; then CLICK on the third dropdown arrow and select the year.
- By **End Date,** CLICK on the first dropdown arrow and select the day on which the report must begin; then CLICK on the second dropdown arrow and select the month; then CLICK on the third dropdown arrow and select the year.
- Now CLICK on **Save** on the bottom of the schedule pop-up screen.
  - Do not CLICK **Save** at the bottom left of the screen as yet. Stay in the report screen as you must now setup your schedule output format.



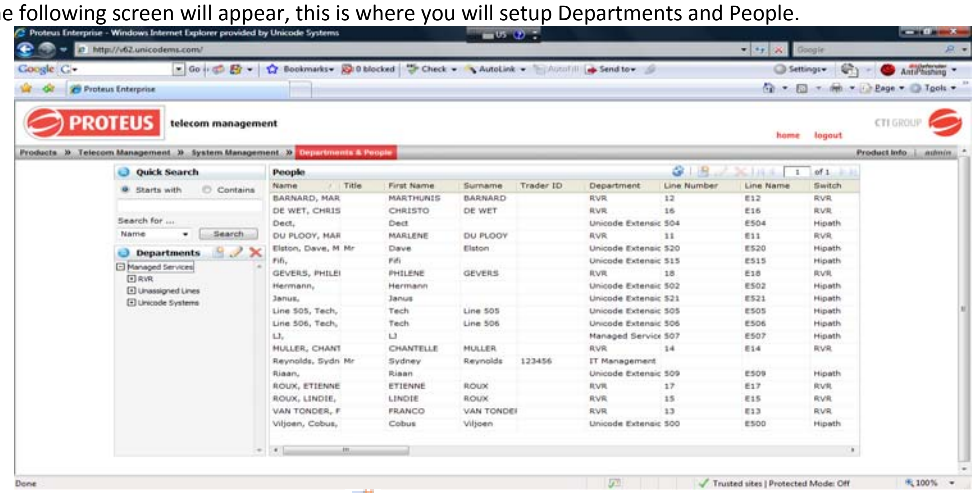
- By **Output To,** CLICK on the dropdown arrow and CLICK on **Email,** then CLICK on the Edit button next to the dropdown arrow, the **Email Output Options** screen will pop-up.
- By **Format,** CLICK on the dropdown arrow and select the format you prefer E.g. Adobe Reader.
- By **To,** Type the e-mail address of the report recipient.
- By **CC,** Type other report recipients you may want to “copy” on the report e-mail.
- By **Subject,** Type a short description for the Report.
- By **Message,** Type a short message to the report recipient.
- CLICK on **Set,** on the bottom of the screen, then CLICK **Save** on the left of the screen.
- The report will now save to your Schedules.

7. Setting up Departments & People

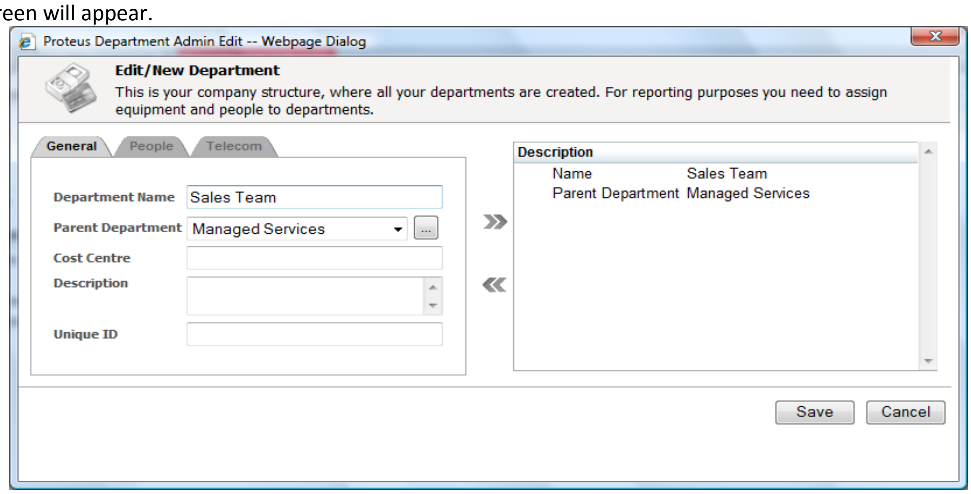
7.1 Creating a Department



- From the Main screen, CLICK on **System Management** (left side of the screen); then CLICK on **Departments & People.**
- The following screen will appear, this is where you will setup Departments and People.

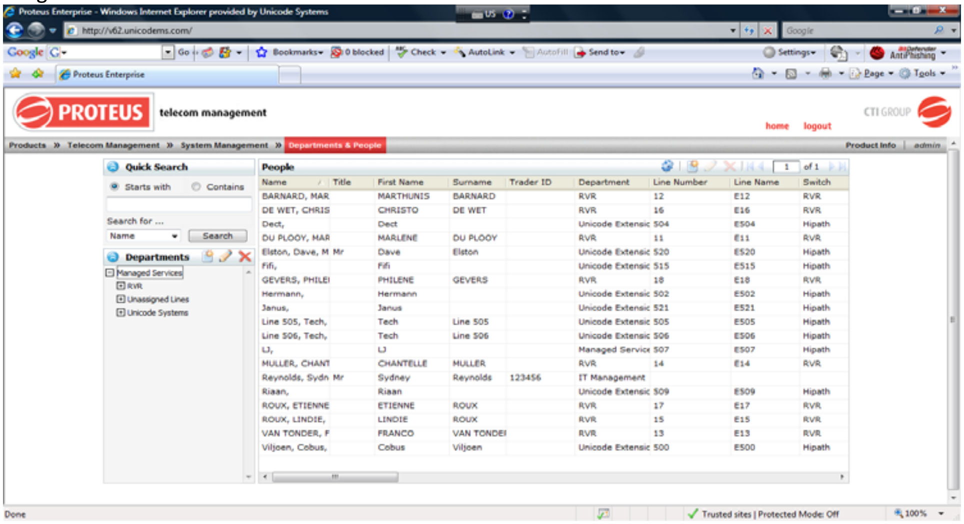


- CLICK on the **Create New Department** button, next to **Departments,** on the left side of the screen, the following screen will appear.

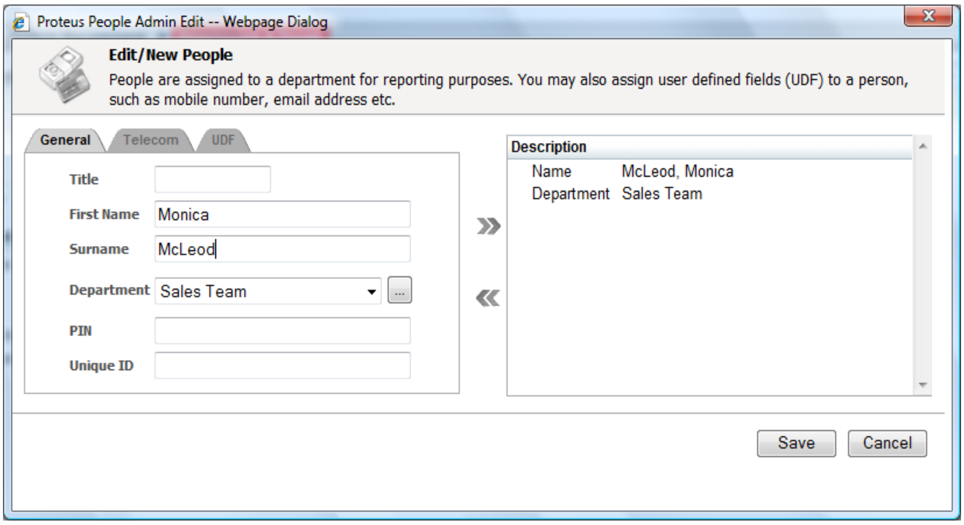


- By **Department Name,** TYPE the name of the new Department.
- By **Parent Department ,** CLICK on the first dropdown arrow and select the Main Department to which the new Department belong.
    - o **Note:** If the new Department is a Main Department then Select the Site Name – this will be at the very top of the list under the dropdown arrow.
- CLICK on the **Save** button on the bottom right of the screen. You will now be back at the main **Departments & People** screen.

7.2 Creating a Person



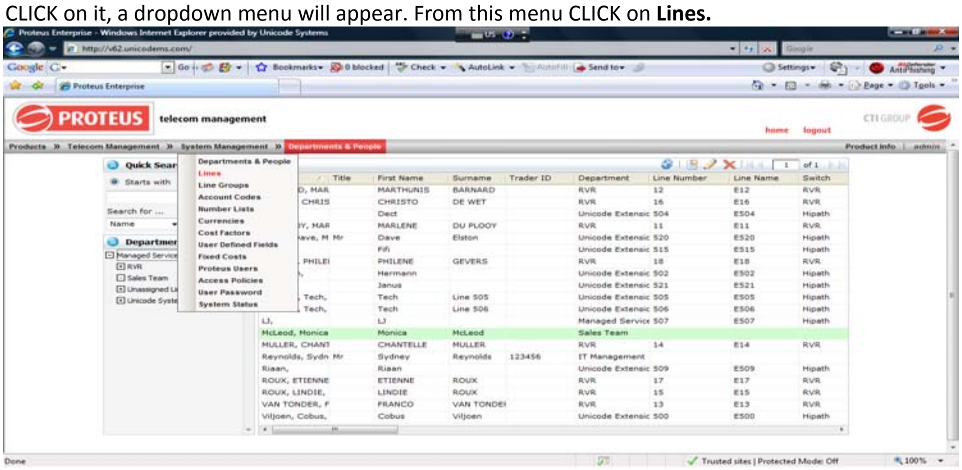
- From the **Departments & People** screen, CLICK on the **Create New Person** button, at the top right of the screen.
- The following screen will appear, this is where you will setup People.



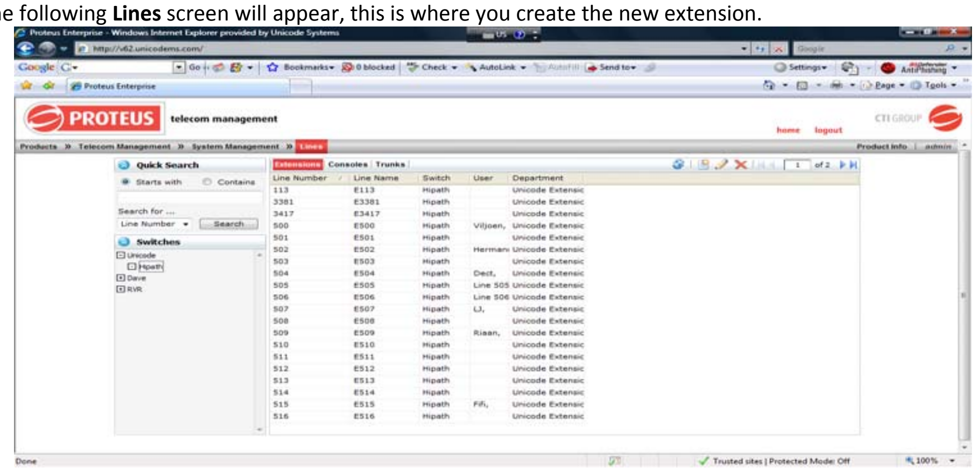
- By **Title,,** TYPE the Title of the new Person E.g. Mr., Ms., Ms.
- By **First Name ,** TYPE the Name of the new Person.
- By **Surname,** TYPE the Surname of the new Person.
- By **Department,** CLICK on the dropdown arrow and select the Department to which the new Person belongs.
- By **Pin,** TYPE the pin number of the new Person.
  - NOTE: This field is only used under the following conditions:
    - a) If your Company uses pin codes.
    - b) Even if your Company does use pin codes – it is *not* filled in if you have a Hicom 300 or Hipath 4000 PABX.
- By **Unique ID,** leave the field blank
- CLICK on the **Save** button, at the bottom left of the screen.

7.3 Creating a New Extension (Line)

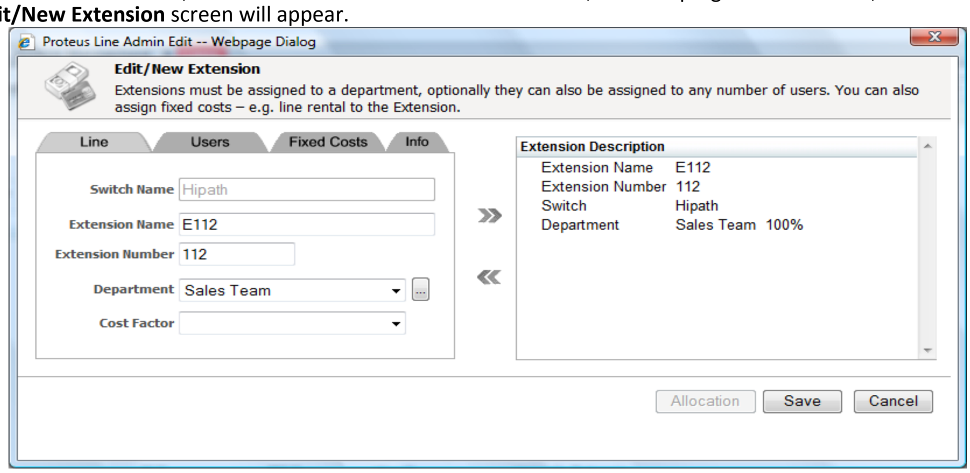
- From the **Departments & People** screen, HOLD the mouse cursor over **System Management** on the top line menu. Do not CLICK on it, a dropdown menu will appear. From this menu CLICK on **Lines.**



- The following **Lines** screen will appear, this is where you create the new extension.

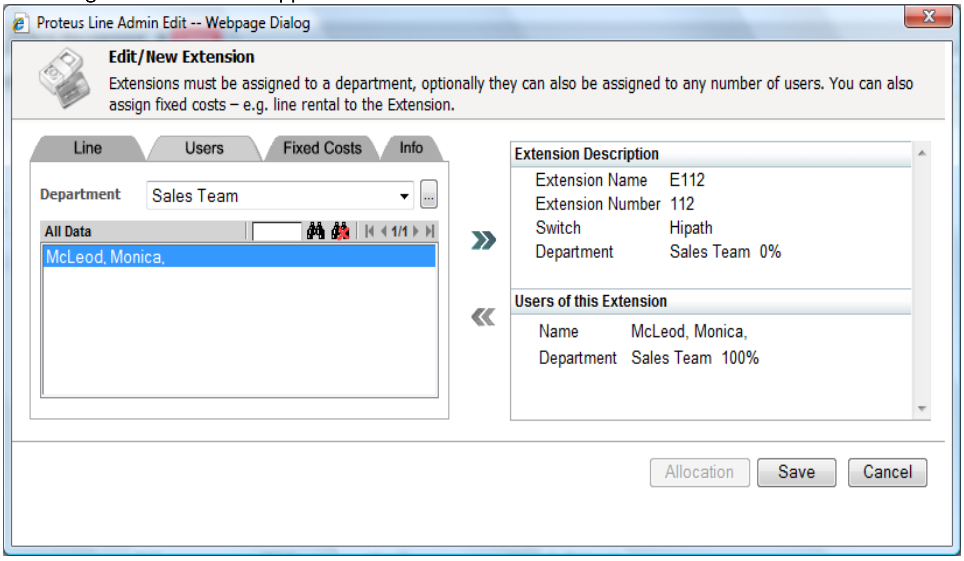


- NOTE: If you are logging multiple sites first, CLICK on the Plus sign, next to the relevant Site name and then CLICK on the Switch name.
- From the **Lines** screen, CLICK on the **Create New Item** button, at the top right of the screen, the following **Edit/New Extension** screen will appear.



- By **Extension Name,** do *not* enter anything.
- By **Extension Number,** type the new extension number.
- By **Department,** CLICK on the dropdown arrow and select the Department to which the extension belongs.
  - o At this time you will notice that the **Extension Name** field has automatically updated itself.
- Now CLICK on the **Users** tab at the top of left of the screen.

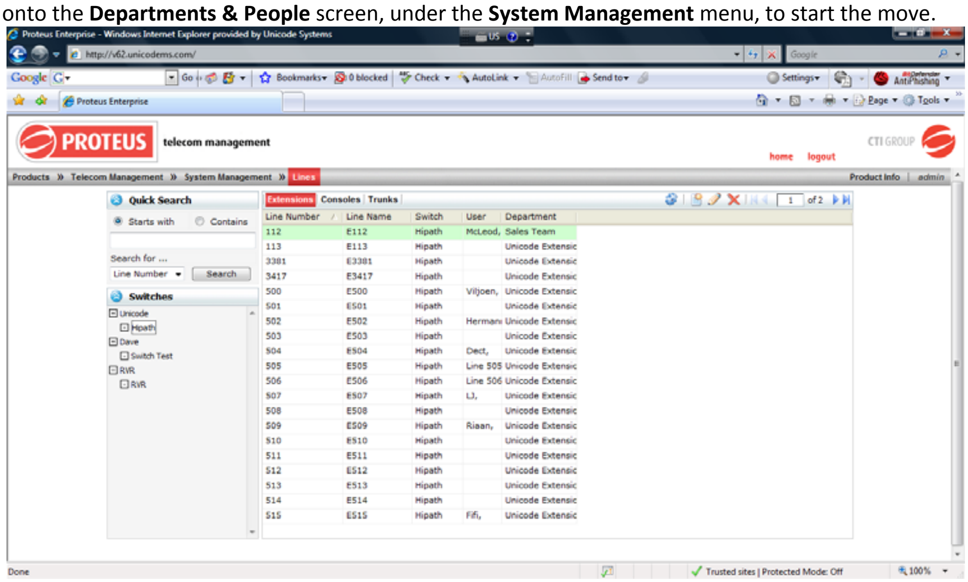
- The following **Users** screen will appear.



- From this screen, you *must* CLICK on the dropdown arrow next to **Department** and select the Department to which the extension user belong.
- CLICK on the User name and CLICK on the Add » button, in the middle of the screen. The user will appear at the right-hand side of the screen.
- NOTE: If the Extension and Person does not show the same Department, then you must go back to the People screen and assign the user to the correct same Department, which the extension belongs to (otherwise the reports will not work correctly).

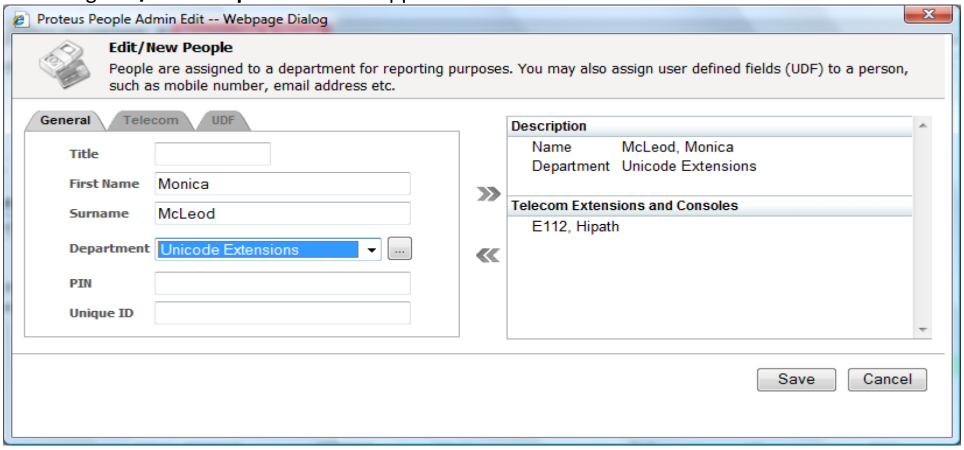
8. Moving a User to Another Extension/Department

8.1 Go onto the **Departments & People** screen, under the **System Management** menu, to start the move.

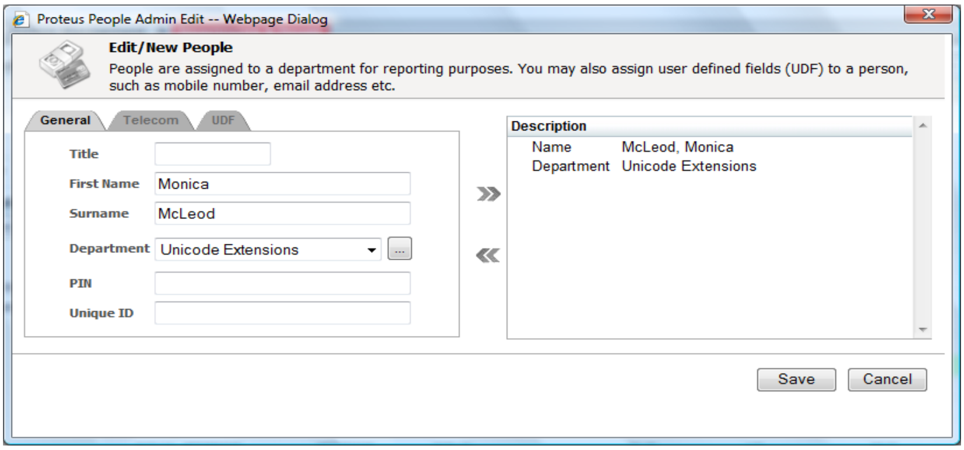


- From the list of extensions and Users that appears, DOUBLE CLICK on the User, which you want to move.

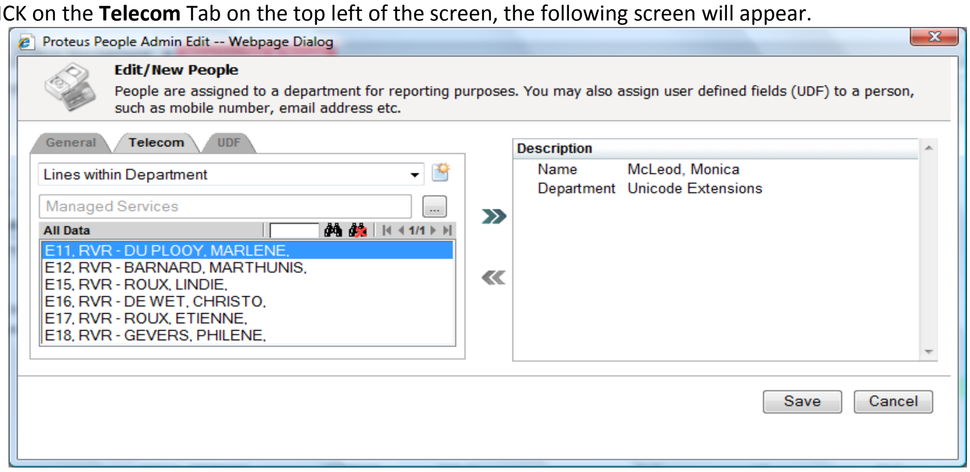
- The following **Edit/New People** screen will appear.



- By **Department,** CLICK on the dropdown arrow and select the Department to which the User must move.
- On the right hand side of the screen, CLICK on the existing extension number then, CLICK on the Remove button. The extension will no longer appear on the right of the screen, and the screen will display as follow.

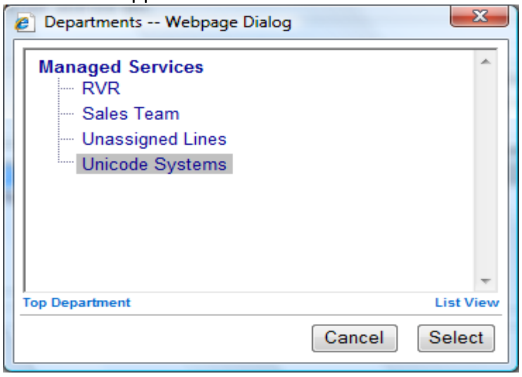


- CLICK on the **Telecom** Tab on the top left of the screen, the following screen will appear.

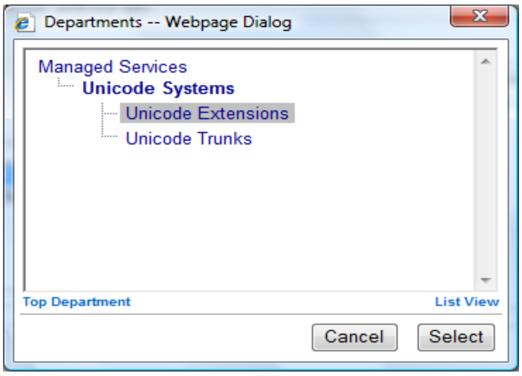


- From this screen you *must* Click on the **More** button to the left of the **Add** button.

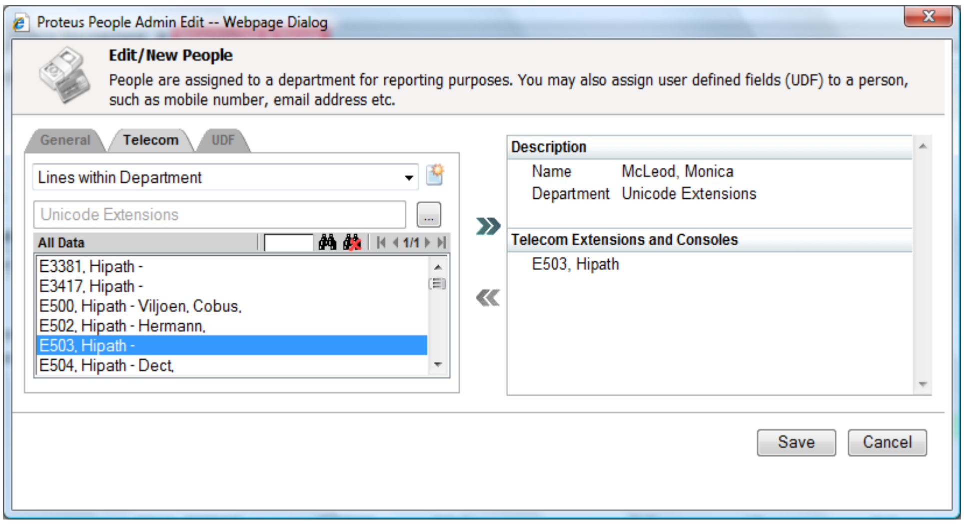
- The following **Departments** screen will appear.



- From this screen:
  a) For Multi-Site logging systems - DOUBLE CLICK on the relevant Switch/Main Department.
  b) For Single-Site logging systems - SINGLE CLICK on the 1 Department Level.

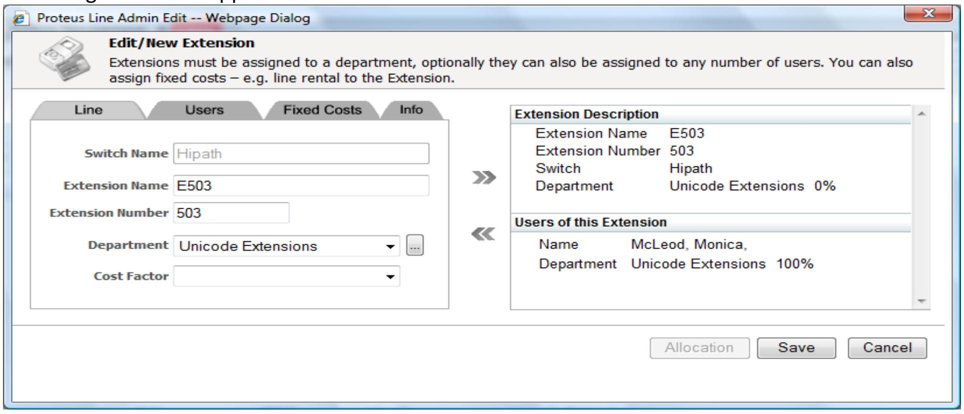


- You will see a Department Tree structure and the screen which will appear will be similar to the screen above.
- CLICK on the Department to which the extension, which you want to move the user to , belongs and CLICK on the **Select** button on the bottom right of the screen
- The following extension list screen will appear.



- CLICK on the new extension number on the left of the screen and CLICK on the **Add** button. Now CLICK on the **Save** button.

- The following screen will appear.



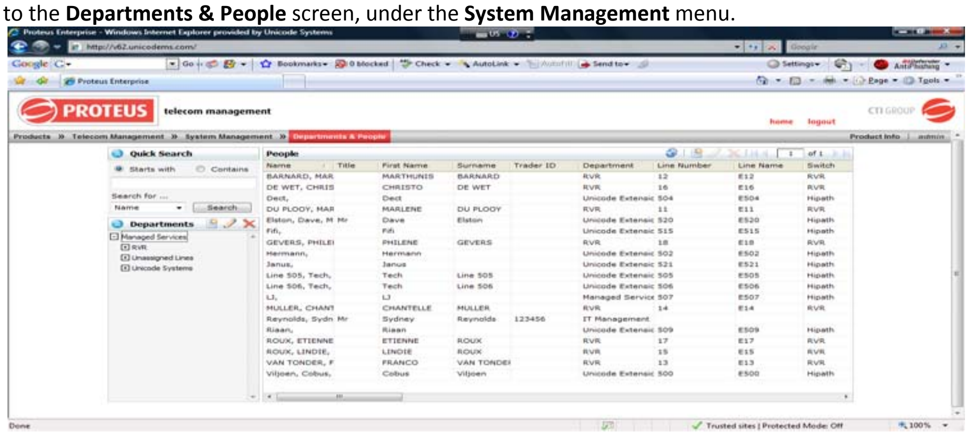
- Check on the right hand side of the screen that the User and Extension is assigned to the same Department (Otherwise the reports will not reflect the correct information). CLICK on the **Save** button.
- If the Departments are different:

a) For the extension, CLICK on the down arrow next to **Department** and select the correct Department.

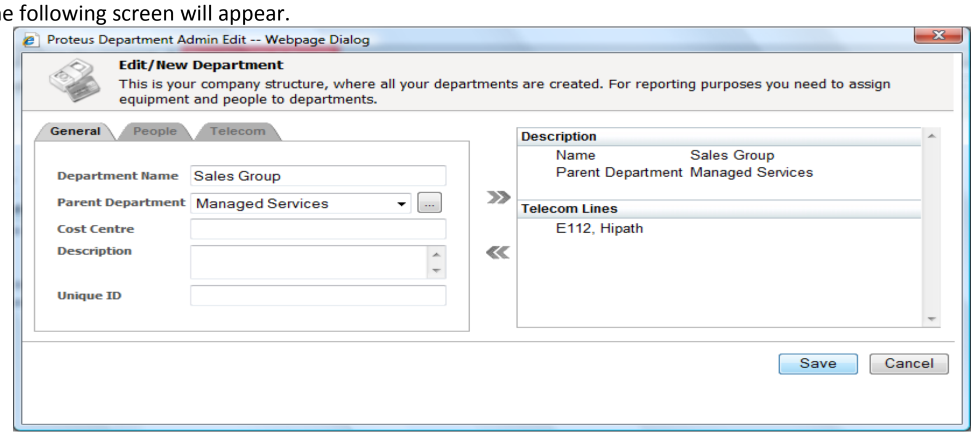
b) For the User, go back to the **Departments & People** screen, double Click the User name and select the correct Department, to which the User must be assigned.

9. Changing a Department Name

9.1 Go to the **Departments & People** screen, under the **System Management** menu.



- CLICK on the Department which you want to change, on the left side of the screen and CLICK on the **Edit** button. The following screen will appear.



- By **Department Name,** delete the old name and enter the new name. CLICK on the **Save** button on the bottom right of the screen.
- The Department name will be changed and will automatically be applied to all Users/Extensions which are assigned to the Department.